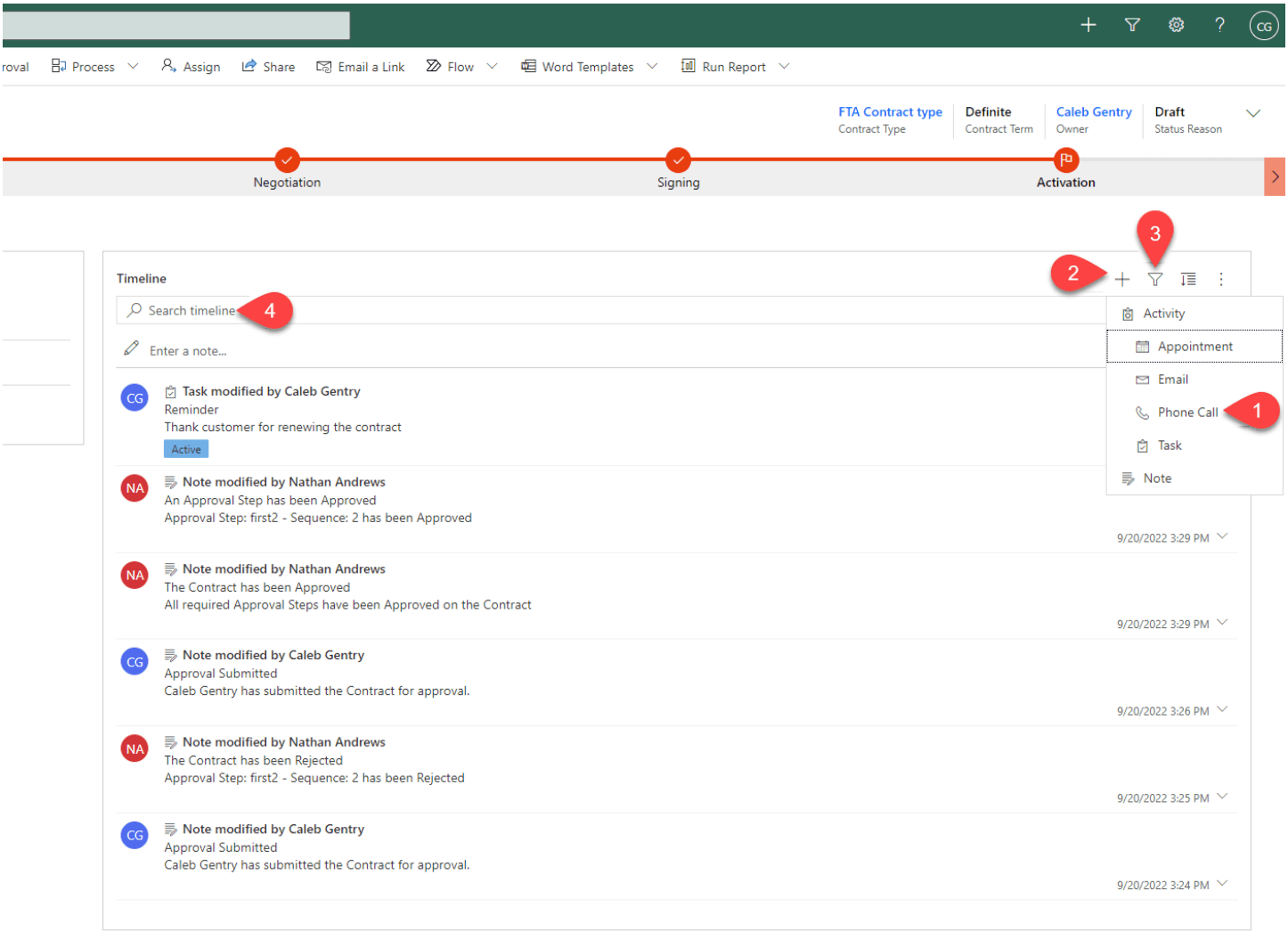
Timeline

General · https://evergreenworx.com/docs/timeline-2/

Records in EvergreenWorx have a Timeline section that acts as a feed of events and activities that have been performed against the record.



1 There are two types of timeline entries: Notes and Activities.

- Notes allow you to create text entries to record details and reminders that don't otherwise have a field on that record.

- Activities provide users with a log of Appointments, Emails, Phone Calls, and Tasks that they can create to track various events that occurred related to the record.

2. To create a new Timeline entry, press the + button on the Activity control and select which type of Activity or Note you want.

3. You can filter the Timeline to only the type of entries you care about seeing.

4. You can utilize the built-in Timeline search to search a Timeline for a key word, which provides an easy to way to search through long notes and email logs.